METHODOLOGY

- Ten-minute online survey
- Quarterly tracking
- Sample via EWS Online Research Panel

POPULATION

- 450 interviews per quarter
- Mobile Majority ages 18-75, determined by U.S. Census data

QUALIFYING CRITERIA

- Ages 18-75
- Not employed in a sensitive industry
- At least a high school graduate
- Has a checking or savings bank account
KEY FINDINGS

• More than three-fifths of consumers this quarter (61%) agreed or strongly agreed (Top 2-Box Score) that tipping has become more top of mind since the start of the COVID-19 pandemic.

• Forty-six percent of consumers in Quarter 4 of 2022 reported a change in their tipping behavior since the start of the COVID-19 pandemic.
  • More than half of those who acknowledged a change in tipping behavior reported that they tip larger amounts now than they did previously, pre-pandemic (55%).

• Three-fifths of consumers this quarter disagreed or strongly disagreed (Bottom 2-Box Score) that they tip the same amount of money, regardless of service quality.

• Consumers this quarter were split on their participation in delivering a special, physical gift to trusted service providers during the holidays (Yes, 51% and No, 49%).

• Consumers this quarter were also split on their participation in “holiday tipping” (Yes, 49% and No, 51%).
  • Of consumers who do participate in holiday tipping, 88% felt fairly confident or very confident in deciding who to tip (Top 2-Box Score).

• Delivery service workers were the most selected “holiday tipping” recipients (62%) this quarter.

• Most of the consumers who reported participating in “holiday tipping” in Quarter 4 of 2022 preferred to deliver their “holiday tips” in December before the end of the year (77%).

• Cash was the most preferred method for regular tipping (70%) and “holiday tipping” (79%) in Quarter 4 of 2022.
TIPPING AND THE COVID-19 PANDEMIC

More than three-fifths of consumers in Quarter 4 of 2022 (61%) agreed or strongly agreed that tipping has become more top of mind since the start of the COVID-19 pandemic.

 Awareness of Tipping Practices

Tipping has become more top of mind since the start of the COVID-19 pandemic.

Source: Q1. Please rate your level of agreement with the following statement: “Tipping has become more top of mind since the start of the COVID-19 pandemic.” (Please select one).

Total (n=450)

Strongly Disagree: 4%
Disagree: 9%
Neutral: 26%
Agree: 36%
Strongly Agree: 24%

61%
Top 2-Box Score

13%
Bottom 2-Box Score
Out of the 46% of consumers in Quarter 4 of 2022 who reported a change in their tipping behavior since the start of the COVID-19 pandemic, more than half (55%) report tipping larger amounts now than they did before.

Has your tipping behavior changed since the start of the COVID-19 pandemic?

- Yes 46%
- No 54%

Tipping Behavior Since the Start of the COVID-19 Pandemic

- I tip more frequently: 29%
- I tip a larger amount: 55%
- I tip less frequently: 8%
- I tip a smaller amount: 8%

Source: Q2. Has your tipping behavior changed since the start of the COVID-19 pandemic? (Please select one). | Q3. How has your tipping behavior changed since the start of the COVID-19 pandemic? (Please select one).
TIPPING PREFERENCES

Among consumers in Quarter 4 of 2022, three-fifths (60%) disagreed or strongly disagreed that they tip the same amount of money regardless of service quality. Cash was the most preferred way to leave a tip (70%).

Change in Tipping Amount Due to Service

I tip the same amount of money regardless of service

60% Bottom 2-Box Score

45%
15%
Strongly disagree
Disagree
Neutral
Agree
Strongly agree

24% Top 2-Box Score

Preferred Way to Leave a Tip

Cash
70%
Check
2%
Digital payments (such as Paypal, Apple Pay, or Zelle)
14%
Other
13%

Total (n=450)
Total (n=450)

Source: Q4. Please rate your level of agreement with the following statement. "I tip the same amount of money regardless of service." (Please select one). | Q5. How do you prefer to leave a tip for a service(s)? (Please select one).
TIPPING PREFERENCES (CONTINUED)
There were no significant differences in the perceived “normal” tipping amount by consumers in Quarter 4 of 2022 versus Quarter 3 of 2021. “Twenty percent of the total bill” was the most selected “normal” tipping amount for both reporting periods (50% for Quarter 3 of 2021 and 52% for Quarter 4 of 2022).

"Normal" Tipping Amount

Source: Q3/Q7. What do you consider to be a "normal" tip amount? (Please select one).

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▲ / ▼ = higher/lower than Q2 2022 at 95% confidence level
TIPPING ETIQUETTE

There were no significant differences in confidence levels for tipping between consumers in Quarter 3 of 2021 versus Quarter 4 of 2022. Most consumers in both quarters felt confident in knowing when to tip and how much to tip (76% in Quarter 3 of 2021 and 74% in Quarter 4 of 2022). More than half of consumers in Quarter 4 of 2022 (54%) reported that they do not seek out updated information on tipping etiquette.

Source: Q2/Q6. Which statement best describes your level of confidence around tipping etiquette? (Please select one). | Q8. Which of the following do you reference for updated information on tipping etiquette? (Please select all that apply).
**HOLIDAY TIPPING**

Fifty-one percent of consumers in Quarter 4 of 2022 reported that they deliver a physical gift to trusted service providers during the holidays. Forty-nine percent of consumers in the same quarter reported that they participate in “holiday tipping”.

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**Delivery of Gifts During the Holiday Season**

*During the holidays, do you deliver a special, physical gift to a trusted service provider?*

- **Yes**: 51%
- **No**: 49%

**Participation in “Holiday Tipping”**

*Do you participate in “holiday tipping”?*

- **Yes**: 51%
- **No**: 49%

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Source: Q9. During the holidays, do you deliver a special, physical gift to a trusted service provider (such as a nanny, teacher, housekeeper, or delivery person)? (Please select one).  | Q10. Do you participate in “holiday tipping”? (Please select one).
HOLIDAY TIPPING (CONTINUED)
Most of the consumers in Quarter 4 of 2022 who participate in “holiday tipping” felt fairly confident or very confident in deciding who to tip (88%). Delivery service workers were the most selected recipients of “holiday tips” by consumers in Quarter 4 of 2022 (62%) who participate in the holiday tradition.

Confidence in Deciding Who to “Holiday Tip”

<table>
<thead>
<tr>
<th>Confidence Level</th>
<th>Participation Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all confident</td>
<td>8%</td>
</tr>
<tr>
<td>Not very confident</td>
<td>4%</td>
</tr>
<tr>
<td>Neither</td>
<td>8%</td>
</tr>
<tr>
<td>Fairly confident</td>
<td>45%</td>
</tr>
<tr>
<td>Very confident</td>
<td>43%</td>
</tr>
</tbody>
</table>

“Holiday Tipping” Recipients

<table>
<thead>
<tr>
<th>Recipient Category</th>
<th>Participation Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caregivers</td>
<td>42%</td>
</tr>
<tr>
<td>Teachers</td>
<td>37%</td>
</tr>
<tr>
<td>Food service industry workers</td>
<td>50%</td>
</tr>
<tr>
<td>Hospitality workers</td>
<td>40%</td>
</tr>
<tr>
<td>Delivery service workers (i.e., USPS, Amazon, or FedEx)</td>
<td>62%</td>
</tr>
</tbody>
</table>

Source: Q11. When you participate in “holiday tipping,” how confident are you in your ability to determine who to tip? (Please select one). | Q12. When you participate in “holiday tipping,” who do you tip? (Please select all that apply.) (Please select one).
HOLIDAY TIPPING (CONTINUED)

Most of the consumers in Quarter 4 of 2022 who participate in “holiday tipping” reported that they prefer to use cash (79%) and deliver their “holiday tips” in December, before the end of the year (77%). More than three-fifths of these consumers reported that they do not set a budget for “holiday tipping” (62%).

Source: Q13. Which of the following payment methods do you prefer to use for “holiday tipping”? (Please select one). | Q14. When do you normally deliver or send “holiday tips” to others? (Please select one). | Q15. Do you set a budget for “holiday tipping”? (Please select one).
Appendix: Demographics
DEMOGRAPHIC PROFILE

**Gender**
- Male: 39%
- Female: 60%
- Non-Binary: 1%

**Age**
- Gen Z: 5%
- Millennial: 33%
- Gen X: 33%
- Boomer: 29%

**Income**
- Less than $50,000: 30%
- $50,000 to $74,999: 24%
- $75,000 to $99,999: 16%
- $100,000 to $149,999: 15%
- $150,000 or more: 16%

**Education**
- Graduate Degree: 18%
- Bachelor's Degree: 36%
- Associate Degree: 14%
- Some College: 23%
- High School: 9%

**Employment**
- Employed full-time: 57%
- Employed part-time: 14%
- Retired: 17%
- Full-time homemaker: 8%
- Unemployed: 2%
- Disabled/Unable to work: 1%

**Ethnicity**
- White or Caucasian: 59%
- Hispanic: 15%
- Black or African American: 13%
- Asian or Pacific Islander: 7%
- Mixed Race: 3%
- Other: 2%

**Marital Status**
- Married: 52%
- Single, never married: 28%
- Separated/divorced/widowed: 13%
- Domestic Partnership: 6%

**Consumer Segmentation**
- Always on Socializers: 22%
- Connected Conductors: 25%
- Pragmatic Introverts: 20%
- Savvy Empty Nesters: 18%
- Segment 5: 11%
- Segment 6: 6%

**Regions**
- Midwest: 60%
- Northeast: 16%
- Southeast: 18%
- Southwest: 11%
- West: 22%
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